



2014 R2

User's Guide

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1. User's Guide for WorkZone Explorer 2014 R2



WHAT'S NEW >



GETTING STARTED >

FAQ

WHY UNCLEAR ERROR MESSAGES?

Sometimes File Explorer does not show user friendly and descriptive error messages from the WebDAV server. When you perform an illegal operation, for example, try to move an archived document to another case, you only see a general error message such as: *Cannot read from source or disk*. Some of the Windows error messages that you might run into are explained in the FAQ items below.

WHY DO I GET AN ERROR MESSAGE WHEN I TRY TO ADD A DOCUMENT TO THE **DRAFTS** FOLDER?

You can only create new documents in folders that represent specific cases. You cannot create a new document directly in the **Drafts** folder, because the WorkZone system requires a case for placing the document correctly. If you try to add a document to the **Drafts** folder, you get the following Windows messages depending on where you try to add it from:

A device attached to the system is not functioning.

- or -

Can't read from the source file or disk.

WHY DO I GET AN ERROR MESSAGE WHEN I TRY TO CREATE A NEW CASE FOLDER?

Some folders do not allow case creation. You can create new cases in the **Open cases**, **Unclassified cases** folders, and in specific case folders. If you try to create a new case folder in a folder, which does not allow case creation, you get the following Windows error message:

Unable to create the folder 'New folder' - File system error

See also [Create case](#).

> [View all FAQs](#)

ADVANCED FEATURES

> [Optimize performance](#)

RELATED PRODUCT DOCUMENTATION

- [WorkZone Content Server Installation Guide](#)
- [WorkZone Services blog](#)

SCANJOUR LINKS

- [ScanJour website](#)
- [ScanJour support](#)
- [ScanJour on !\[\]\(cdf2842d82858164c68c92720a337fb9_img.jpg\)](#)

2. What's new

WORKZONE EXPLORER 2014 R2

Flat case folder hierarchy

You can now change the setup of WorkZone Explorer to display child cases in lists as in WorkZone Client and Captia Web Client. Parent and child cases now display in a flat hierarchy in the lists. By default WorkZone Explorer does not display child case folders in lists in File Explorer.

For information on changing the setup, see [Configuring WorkZone Explorer](#) in the WorkZone Content Server Installation Guide.

Shortcut to immediate parent case in search results

When you free text search on cases using the **WorkZone Cases** search connection and you double-click on a case in the search results, you can see if it is a child case if the folder contains the shortcut . Next to the shortcut, the name of the immediate parent case is shown. Double-click the shortcut to open the immediate parent case in File Explorer.

Name



 ..(2014-001485) Parent case

 = Open Case in Captia

See [Search for cases and documents](#).

Danish search tags

You can now filter search results using Danish search tags in a Danish version of Microsoft Windows. See [Filter search results using search tags](#).

WORKZONE EXPLORER 2014

New folders

The following folders are new:

 Changed cases

 Changed documents

 Shared lists

 Unanswered documents

 Unclassified cases

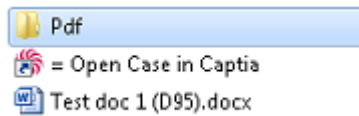
See [Folder types](#).

Child cases inherit the case class and access code of the parent case

When you create a new folder in a case folder, the new folder becomes a child case and the child case inherits the case class and access code of the parent case. See [Create child cases](#).

PDF sub folder in case folders

A new PDF sub folder in case folders contains PDF versions of documents on the case. See [PDF versions of documents](#).

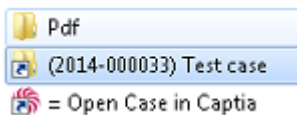


Letter date displays as date modified in File Explorer

The letter date entered in WorkZone Client or Captia Web Client is now shown in the **Date Modified** column in File Explorer.

Shortcut to next child case folder appears when the path in File Explorer is very long

If your case folder hierarchy is deep, the path in File Explorer becomes very long and at some point the maximum limit set by Microsoft Windows is met, meaning that you cannot browse to the next child case folder using the arrow buttons in File Explorer. In this case, a shortcut to the next child case folder in the hierarchy appears. Double-click the shortcut to open the next child case folder and then you can continue using the arrow keys to browse further through the folder hierarchy.



Shorter case folder names

The consecutive case number has been removed from the case folder names to shorten the name. Example of a case folder is: (2014-000005) Test case.

WORKZONE EXPLORER 2013 R2

WorkZone Explorer 2013 R2 contains the following new features:

- WorkZone Explorer now displays the following new folders in File Explorer:
 - **Recent cases**
 - **Recent documents**
 - **Favorite cases**
 - **Favorite documents**
 - **Followed cases**
 - **Followed documents**
 - **Reading list cases**
 - **Reading list documents**

See [Folder types](#) for more information about the new types of folders.

- Cases folders representing closed cases now have an X on the icon . The X on the archived document icon  has been removed from the icon.

- The modified date for a case is now updated automatically when documents on the case are edited, or when documents are added or removed from the case. See [Date Modified on Cases](#).

WORKZONE EXPLORER 2013 SP1

- The versioning part, DeltaV, of the WebDAV protocol is now supported by WorkZone Explorer.
- New folder named **My lists**, which exposes searches defined and saved by the user from WorkZone Client or Captia Web Client. See [Folder types](#).
- New icon for read-only documents. Read-only documents used to be highlighted in blue. Now the  icon indicates that the document is read-only. See [Read-only documents](#).
- Create new cases. See [Working with cases](#).
- Create child cases. See [Working with cases](#).
- Free text search on cases and documents. See [Search for cases and documents](#).

3. Getting started

WorkZone Explorer uses WebDAV (Web Document Authoring and Versioning), which is a standard document protocol over HTTP. With WorkZone Explorer, you can manage cases and documents from File Explorer. You can perform common operations on cases and documents such as creating and renaming cases and documents, opening, editing, and saving documents directly into the WorkZone archive from a document editor that supports the WebDAV protocol, for example, Microsoft Office or Notepad.

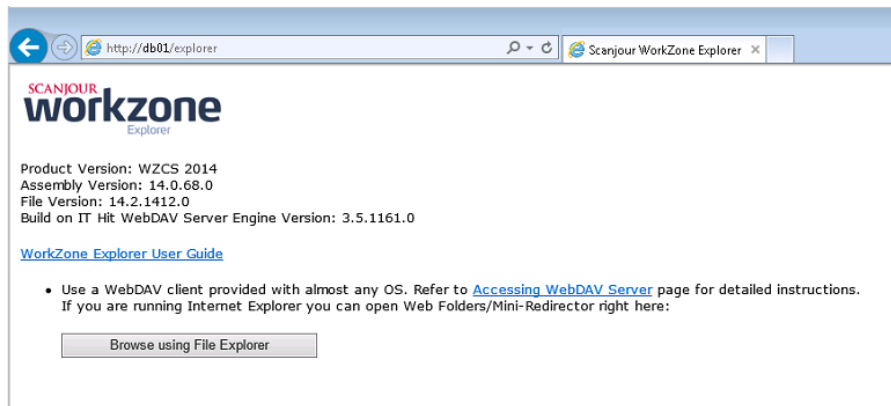
WorkZone Explorer is part of the WorkZone Content Server installation. Note that it is not required to install a client, such as WorkZone Client or Captia Web Client.

START WORKZONE EXPLORER

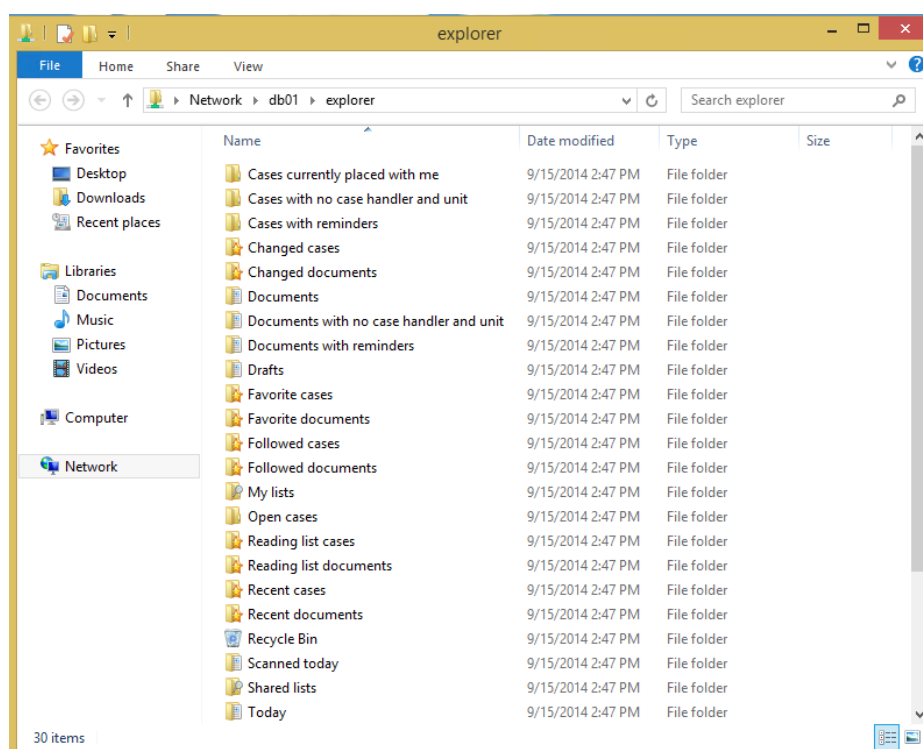
1. Enter this URL in your browser: `http://<host>/explorer`.

Example: `http://db01/explorer`.

A welcome page displays:



2. Click **Browse using Windows Explorer** to open File Explorer:



In File Explorer, you can also access the database directly by typing `\\<host>\explorer` in the address bar.

WorkZone Explorer now displays folders in File Explorer that represent the standard case and document lists, see [About the folders](#).

Tip: You can map a point in the folder structure to a network drive in File Explorer. Right-click on **Network**, click **Map network drive** and then browse to select the folder that you want to map.

MULTIPLE DATABASES

If more than one WorkZone Content Server database was specified during installation of the WorkZone web server, you open them in separate File Explorer windows.

LEARN HOW TO WORK WITH CASES AND DOCUMENTS IN FILE EXPLORER

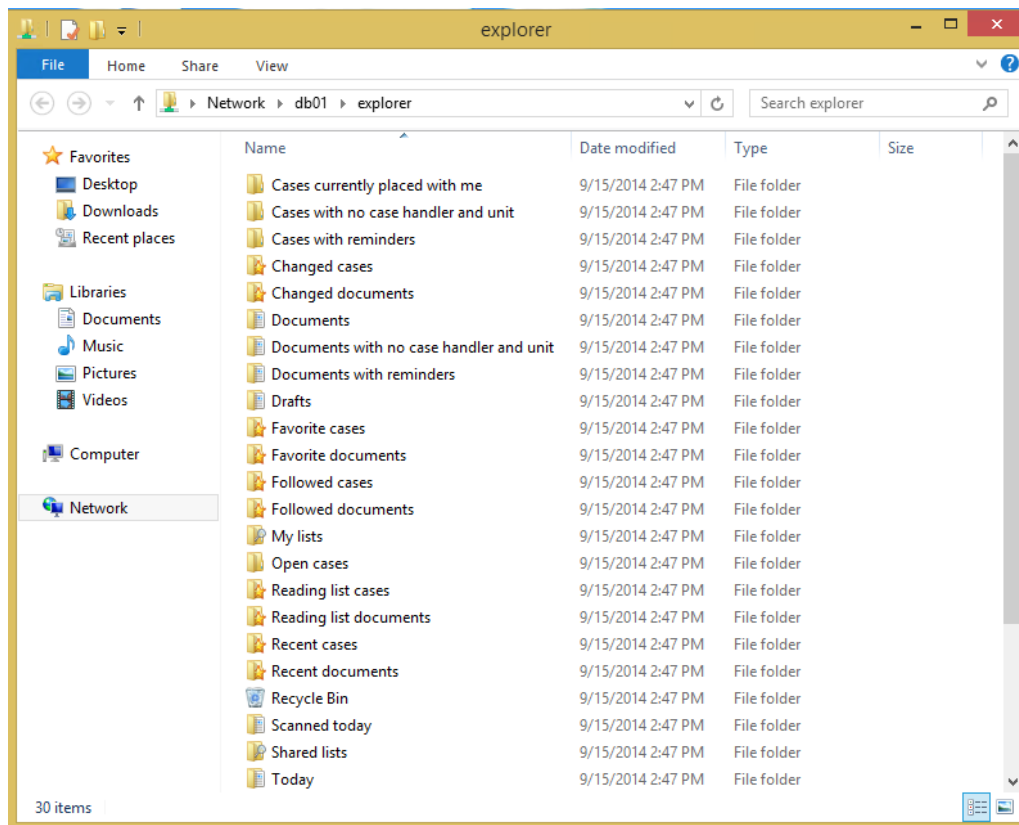
To learn more about the type of folders shown in File Explorer, see [About the folder structure](#).

To learn more about working with cases and documents, see [Working with cases](#) and [Working with documents](#).

Important: You can optimize the performance of WorkZone Explorer by changing a couple of Internet Explorer settings, see [Optimize performance and user experience](#).

4. About the folders

WorkZone Explorer gives you access to folders in File Explorer that represent standard case and document lists, for example, **Drafts**, **Open Cases**, and so on. In addition, there are search connectors and a **Recycle Bin** folder.

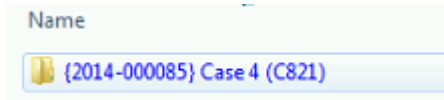


FOLDER TYPES

The table below gives you an overview of the types of folders that you see in File Explorer:

Folder type	Description
 Case lists	Folders that represent standard case lists, such as:  Open cases  Cases currently placed with me  Cases with no case handler and unit  My case reminders one week ahead  Unit's cases with no case handler  Unit's open cases
 Document lists	Folders that represent standard document lists, such as:

Folder type	Description
	 Documents  Drafts  Document reminders  Documents with no case handler and unit  Scanned today  Today
 Case folders	Folders that represent specific cases in the database. A folder represents one case and contains all the documents of that case. It may also contain child cases. Child cases are shown as sub folders.  - {2014-000080} Case 1 -  {SJ-TEMP-000082} Child case (C921) The case number is displayed in brackets in the folder name, for example, {2014_000005} Test case. If the case folder has the icon , the case is closed. Each case folder contains a shortcut to open this case. Double-click the  shortcut to open the case in WorkZone Client or Captia Web Client.
 My lists	This folder contains searches that you have saved from WorkZone Client or Captia Web Client to the database. Sub folders in the My lists folder correspond to saved searches.
 Shared lists	This folder contains lists that other users or your organization have shared with you. Note: You can share lists from WorkZone Client only.
 Recent cases	The folders contain the last cases and documents you have opened, so that you can quickly open a case or document again.
 Recent documents	
 Favorite cases	The folders contain the cases and documents that you have marked as favorites in WorkZone Client or dragged and dropped to the favorite folders in File Explorer. See Add or remove cases to the Favorite cases folder and Add or remove documents in the Favorite documents folder .
 Favorite documents	
 Followed cases	The folders contain cases and documents that you have marked as followed and that you want to be able to find quickly. For example, you might want to follow another case handler's cases and documents. Drag and drop the cases and documents that you want to follow to either the Followed cases or
 Followed documents	

Folder type	Description
	Followed documents folders.
 Changed cases	The folders contain cases and documents that have been changed by other users since you viewed them last time. The blue color indicates that a case or document has changed. The folders contain lists of cases and documents that you want to remember to read. You add cases and documents by dragging and dropping them in the reading list folders. In some cases, cases and documents are also added to the reading lists automatically. For example, if a document has been changed by someone else or if you are added as a case handler on a case, this case or document is marked in blue.  Once you have opened the cases or documents, they are automatically removed from the reading list folders. You do not have to open the cases or documents from the reading lists, you can also open them from any other folders.
 Changed documents	
 Reading list cases	
 Reading list documents	
 Unclassified cases	This folder contains the cases with you as a case handler that have not been classified yet. An unclassified case is a case in the case group named SJ-TEMP. SJ-TEMP is the default case group used when creating cases from WorkZone Explorer. For more information, see Create case.
 Unanswered documents	This folder contains documents with reply deadlines that you have not yet replied to.
 Recycle Bin	The Recycle Bin contains documents that you have moved from other folders to this folder in order to delete them. The Recycle Bin folder contains a folder named Restore that enables you to restore a deleted document from the Recycle Bin folder to the case it was originally saved on. For more information, see Delete and restore documents.

Important: Due to performance reasons WorkZone Explorer displays the 1000 most recent entries in a folder. For documents, it is related to the last document update and not the last change of the document meta data. For cases, it is related to the last meta data change on that case.

5. Working with cases

You can perform the following actions on cases in File Explorer.

CREATE CASE

You can create new cases in File Explorer by creating new subfolders in these folders:

- **Open cases**
- **Unclassified cases**
- Case folders

When you create a new case through WorkZone Explorer, it is created automatically in a temporary case group named SJ-TEMP. You can change the case group and other required information later using WorkZone Client or Captia Web Client. Cases that are created in SJ-TEMP are automatically added to the **Unclassified cases** folder regardless of where they were created.

Note: If your organization only use facets and not case classes, you can configure WorkZone Explorer to add a specific case class as the default case class. This is done in the `web.config` file. For more information, see [Configure file class for WorkZone Explorer](#) in the WorkZone Content Server Installation Guide.

Important: The create case functionality is not available by default. Case creation must be enabled on the SJ-TEMP case class in WorkZone Configuration Management.

CREATE CHILD CASES

You can create child cases in File Explorer in two ways:

- Move a case folder to another case folder. The case folder that you move becomes a child case.
- Create a new folder in a case folder. The new folder becomes a child case. The child case inherits the file class and access code of the parent case.

RENAME CASES

You can rename a case by renaming the case folder.

ADD OR REMOVE CASES TO THE FAVORITE CASES FOLDER

You add cases to the **Favorite cases** folder by dragging and dropping case folders in to the **Favorite cases** folder.

To remove a case from the **Favorite cases** folder, drag and drop the case folder in to the **Recycle bin** folder.

Note: The case is not deleted. It is only removed from the **Favorite cases** folder.

DATE MODIFIED ON CASES

The date modified for a case is updated automatically in File Explorer when documents on the case are changed or when documents are added to or removed from the case.

Note: Sometimes it may look as if a user has updated a case without having the proper access rights. This happens when the user has access to a document on the case but not to the case itself. For example, when a user edits a document that is not protected by the case and the user does not have update access to the case. This is standard behavior and does not represent a security issue.

6. Working with documents

You can perform the following actions on documents in File Explorer using WorkZone Explorer.

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CREATE NEW DOCUMENTS

You can create new documents directly in File Explorer or by selecting **Save As** from a document editor.

You can only create new documents in case folders. You cannot create a new document directly in, for example, the **Drafts** folder, because the WorkZone system requires a case for placing the document correctly in the system.

You can also create a new document by copying it from another location to a case folder. In this case, the read-only state of the document is kept in WorkZone Explorer. It will be created with the state **UA** (Draft) or **UL** (Locked) depending on the read-only file property of the new document. The document will be created with few metadata, the title is taken from the file name, the state from the read-only attribute, and the document type used is **N** (Internal).

The system automatically appends the [Document identifier](#) identifier when refreshing File Explorer. You can open the document using either the file name supplied by the client (without the Dxxxxx identifier), as long as the document remains on the same case and is not further renamed, or you can use the full name (with the Dxxxx identifier).

RENAME DOCUMENTS

You can rename documents from File Explorer. The new name replaces the document title in the WorkZone system. The (Dxxxxx) identifier is automatically appended when refreshing File Explorer. The (Dxxxxx) identifier does not become part of the document title in the WorkZone system and you do not have to keep the (Dxxxx) identifier in the new name, it will automatically be appended upon refresh of File Explorer. You can open the document with and without the (Dxxxxx) identifier in the file name.

WORK WITH DOCUMENTS OFFLINE

If you have taken a document offline, for example, copied it to the Windows Desktop or to a USB stick, you can copy it back into the WorkZone database. This means that the document is updated in the database provided that you have not changed the (Dxxxx) part of the file name. When you copy the document back, File Explorer displays a message asking if you want to replace the existing version, keep both versions, or cancel. If you copy to a case folder, you can choose between all three options. However, if you copy the document to a folder that represents a standard list, for example, the **Drafts** folder, you can only choose between replace and cancel.

Note: If you save the document with a new name when working offline and then try to copy it back to the WorkZone database, a message displays asking you whether you want to replace the existing document or keep both versions. If you reply **Replace**, the document is copied back to the database but it keeps the original name. If you want to use a new name, you must rename the document in File Explorer.

MOVE DOCUMENTS

You can move documents from one case to another provided that the state of the document in the WorkZone system allows it. You can move documents using drag and drop or cut and paste.

COPY DOCUMENTS

You can copy documents from one case to another case or even from one database another database. When you copy a document, a copy of the document is created but document meta data have new default values. This means, for example, if you copy a document with access codes, the copy gets the default access codes and not the access code of the original document.

DELETE AND RESTORE DOCUMENTS

It is not possible to delete documents directly from folders but you can move documents to the **Recycle Bin** and then delete the document from this folder. The **Recycle Bin** is personal, which means that you only see the documents that you have moved there. The **Recycle Bin** contains a **Restore** folder. If you drag a document from the **Recycle Bin** to the **Restore** folder, it will be moved back to the case folder where it was originally placed. It is also possible to restore a recycled document to another case by moving it from the **Recycle Bin** to another case folder.

ADD OR REMOVE DOCUMENTS IN THE FAVORITE DOCUMENTS FOLDER

You can add documents to the **Favorite documents** folder by dragging and dropping the documents on the folder.

To remove a document from the **Favorite documents** folder, press the **Delete** button. A message displays "Are you sure you want to permanently delete this file?". Click **Yes** to remove the document from the list.

Note: The document is not deleted but only removed from the **Favorite documents** folder.

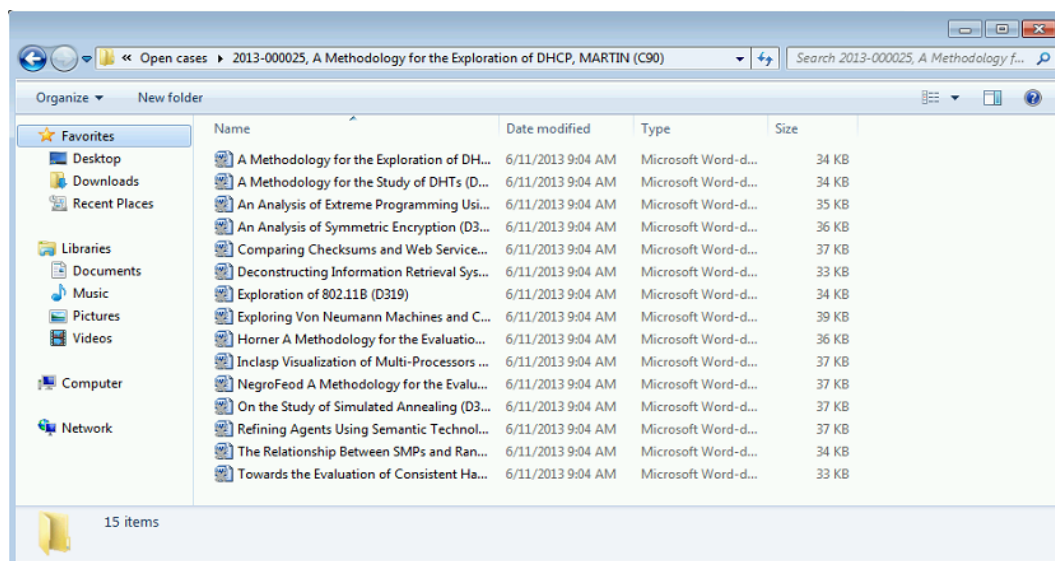
PDF VERSIONS OF DOCUMENTS

All case folders contain a PDF folder for PDF versions of documents created on a case. It contains the PDF versions that you have created from WorkZone Client or Captia Web Client.

6.1 About documents

You can open and edit all documents from any type of folder provided that you have the corresponding application installed. Note that the same document may appear in several folders. For example, a draft document is located in both the **Drafts** folder and in the case folder where it belongs. You can open and edit the document from either folder. The changes you make are reflected in both locations. If you open a document from the **Recycle Bin**, the document opens in read-only mode.

The example below shows the documents on a specific case:



Note: The WorkZone Explorer server does not expose cases of the state "O" (so-called "information cases") as they represent metadata without a document, which is not relevant for WorkZone Explorer.

READ-ONLY DOCUMENTS

Read-only documents are documents that have the states **UL** (Locked), **ARK** (Archived) or **AFS** (Closed). Documents with these states cannot be edited. Microsoft Office products recognize the state and open the documents in read-only mode.

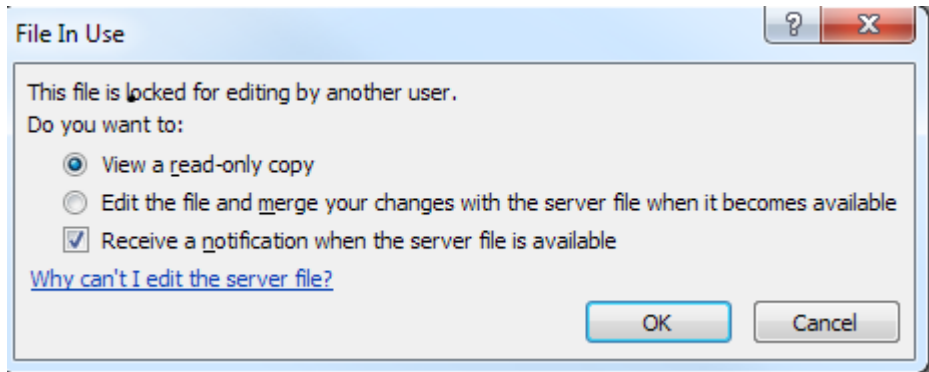
Document state	Possible actions
UL (Locked)	It is a read-only document. You can move and rename the document.
ARK (Archived) or AFS (Closed)	It is a read-only document. You can rename the document.

You can change a non-read-only document to read-only in the **File Properties** dialog box. If you do so, you change the document state to **UL**, a locked draft. You cannot remove the read-only attribute as the system does not allow this. If you try to change the attribute, it will have no effect.

See also [Document attributes and document states](#).

CHECK-OUT

Microsoft Office products automatically lock (documents are checked out in WorkZone products) editable documents when they are opened. This prevents two users from editing the same document at the same time, or the same user from editing the same document from different folders at the same time. For example, Microsoft Office has a feature that notifies the second user who opens a document when the document becomes available for editing. Microsoft Office can also allow editing from both users at the same time and automatically merge the changes. This feature works automatically with WorkZone Explorer. This is the Microsoft Office dialog box shown when a second (or third) user opens a document that is already being edited by someone else:



Note: Some documentation editors, for example Notepad, only locks (checks out) the document when saving. This means that the last edit is always applied.

DOCUMENT IDENTIFIER

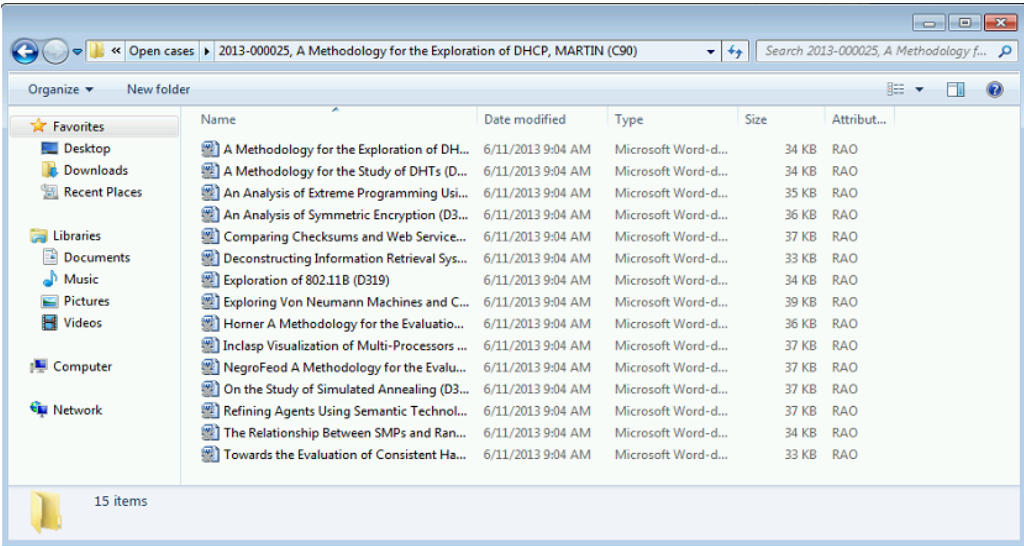
All documents have a document identifier (Dxxxx) as part of the file name.

DRAFT VERSIONING

If draft versioning is enabled in WorkZone Configuration Management, new versions of a document are created automatically. Versioning applies to documents with the state **UA** (Draft) or **UP** (Personal draft).

DOCUMENT ATTRIBUTES AND DOCUMENT STATES

In the example below, the **Attributes** column is added to the folder view in File Explorer. In this column, you can see the different file attribute combinations that can be exposed from the system.



Attribute	Document state and possible actions
A	An editable document with the state UÄ (Draft) or UP (Personal draft). You can edit, move, rename, and change the document to read-only.
RAO	A read-only document with the state UL (Locked). You can move and rename the document.
RO	A read-only document with the state ARK (Archived) or AFS (Closed). You can rename the document.

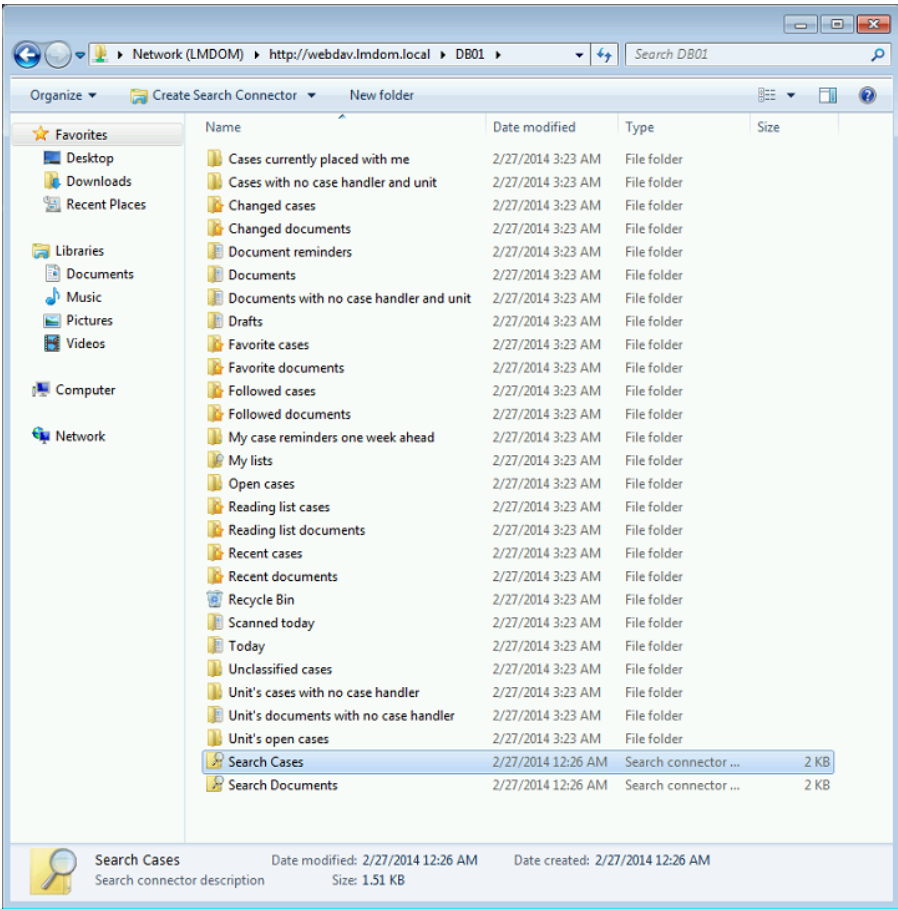
7. Search for cases and documents

You can search for cases and documents directly from File Explorer. Before you can start doing searches you must enable searching by adding two search connectors, one for cases and one for documents.

7.1 Supported search tags 27

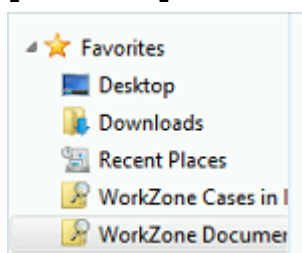
ENABLE FREE TEXT SEARCH ON CASES AND DOCUMENTS

- 1. In File Explorer, double-click the  **Search Cases.osdx** search connector or the  **Search Documents.osdx** search connector.



- 2. In the **Add Search Connector** dialog box, click **Add** to add the WorkZone Cases and WorkZone Documents search connectors to File Explorer. The search connectors **WorkZone Cases in [database]** and **WorkZone Documents in**

[database] are added to **Favorites**.

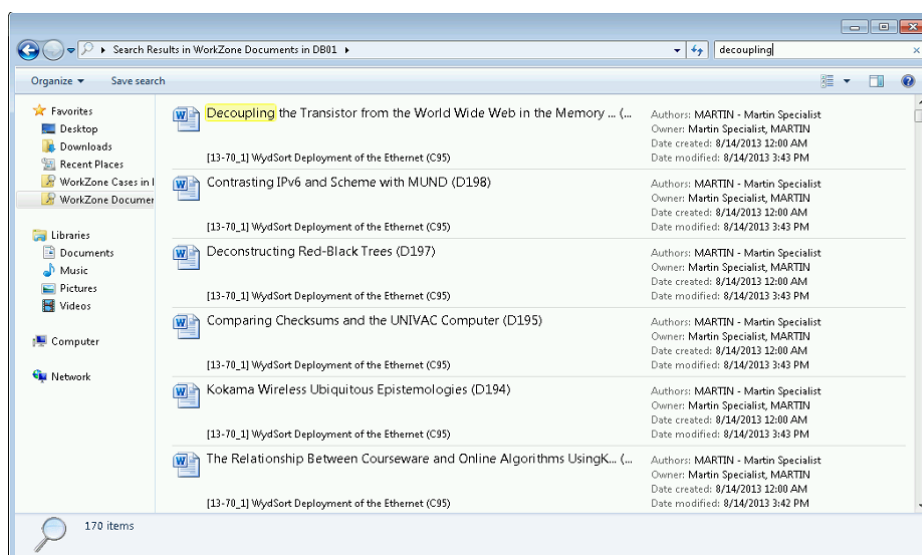


SEARCH FOR CASES AND DOCUMENTS

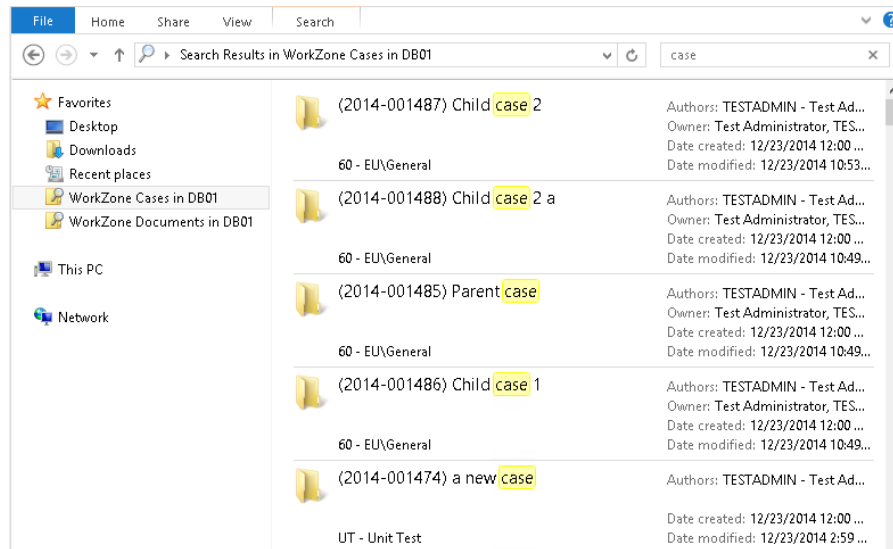
1. Double-click the **WorkZone Cases** or the **WorkZone Documents** search connector depending on what you want to search for.
2. Enter a search term in the **Search** field and press ENTER. The search result is listed below.

Note: The search results displays maximum 1000 hits. The most recent cases and documents are shown in the search result.

Example of a document search result:



Example of a case search result:



If you double-click on a case in the search results and it is a child case, you can double-click the  shortcut to open the parent case in File Explorer.

Name

 Pdf

 ..(2014-001485) Parent case

 = Open Case in Captia

3. Double-click the case or document to open it.

Important: The search in WorkZone Explorer should not be confused with the free text search in File Explorer, which searches in file names.

FILTER SEARCH RESULTS USING SEARCH TAGS

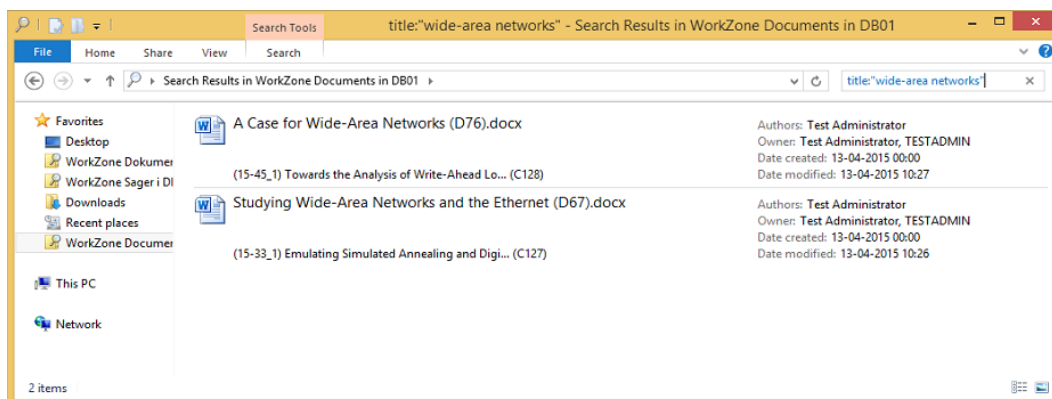
When you search using search connectors, you can use search tags to filter the search results for better overview. The search tags filter the current search results based on the text that you enter. Case folders and documents are displayed as search results if your search text matches the name, tags, or other properties.

EXAMPLE: DOCUMENT SEARCH

You want to search for a document with a specific text in the document title, for example "wide-area networks".

In the search box, enter:
title:"wide-area networks"
or
title:(wide-area networks)

Note: If you omit the quotes or the brackets, you search for "wide-area" AND "networks".

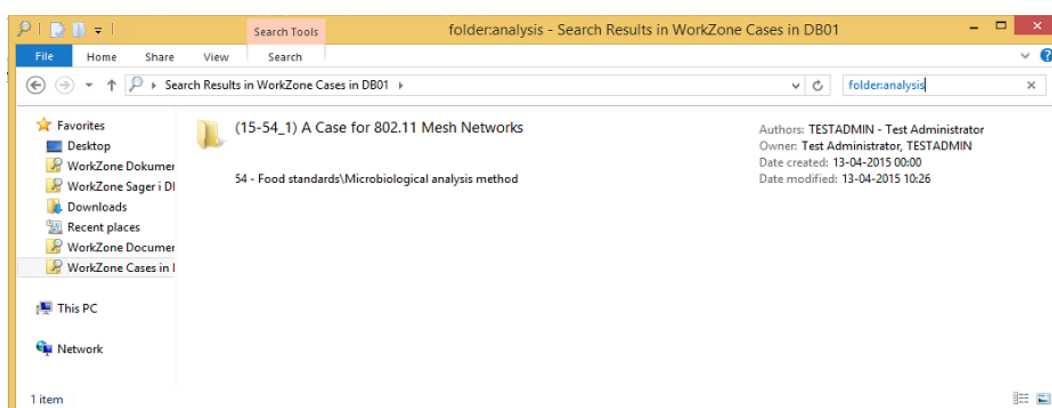


The search results display two documents on two different cases.

EXAMPLE: CASE SEARCH

You want to search for cases in a specific case group. You know that the case group contains the text "analysis". In WorkZone Explorer, the case group is shown as a folder in a path.

In the search box, enter:
folder:analysis



The search results show one case where the case group contains the word "analysis".

Filter using dates, date ranges, and date and size expressions

You can use dates, date ranges, and date and time expressions with some of the search tags. You can, for example, filter on when cases and documents were created, modified, due, or closed.

Date

Use these date formats to filter based on a date:

- dd-MM-yyyy
- yyyy-MM-dd
- dd/MM/yyyy

EXAMPLE

You want to view cases that were modified on a specific date. In the search box, enter:

datemodified:15-01-2015

Note: If Windows is set up to use a different date format than dd-MM-yyyy, the search on date will not work. You can change the Windows date format **Control Panel > Clock, Language, and Region > Change date, time, or number formats > Short date** field.

Date range

Use the format dd-MM-yyyy .. dd-MM-yyyy to filter on cases and documents within a certain period of time.

EXAMPLE

You want to view cases that were modified the first two weeks of January. In the search box, enter:

datemodified:01-01-2015 .. 15-01-2015

Date expressions

You can use the following date expressions with search tags:

- today
- yesterday
- this week
- last week
- this month
- last month
- this year
- last year

EXAMPLE

You can, for example, filter on cases or documents that were modified today. In the search box, enter:

modified:today

Size expressions

You can use the following size filters with the search tag:

- empty
- tiny
- small
- medium
- large
- huge
- gigantic

EXAMPLE

You want to view large documents.

size:large

Combine search tags

You can combine search tags and this way narrow your search results even more. Separate the search tags with a space.

EXAMPLE

You want to search for a document with the text "research" in the document title with a specific case group that contains the text "laws". In the search box, enter:
title:research folder:laws

More search tag examples

Below you can find examples of how to use search tags.

Search tag	You want to view	Enter in Search field
created:	Cases or documents created on a specific date.	created:15-01-2015
	Cases or documents that were created today.	created:today
datecreated:	Same as above.	datecreated:05-01-2015
date:	Same as above.	date:05-01-2015
modified:	Cases or documents that were modified this week.	modified:this week
datemodified:	Cases and documents that were modified yesterday.	datemodified:yesterday
due:	Cases or documents that are due within a certain period of time.	due:01-01-2015 .. 15-01-2015
completed:	Cases or documents that were closed within a certain period of time, for example this month.	complete:this month
folder:	Cases or documents with in a specific case group, for example a case group named "laws".	folder:laws
folderpath:	Same as above	folderpath:laws
open:	Only closed cases or documents or only open cases or documents.	Closed cases or documents: open:false Open cases or documents: open:true
end:	Cases or documents with a specific planned completed date (cases) or reply deadline (documents), for example today.	end:today
owner:	Cases or documents assigned to a specific case handler, for example "Martin".	owner:Martin

Search tag	You want to view	Enter in Search field
author:	Cases or documents created by a specific employee. You want to search on the employee 's initials, for example "mar".	author:mar Tip: You can also enter: author:@me to only view cases that were created by you.
authors:	Cases or documents created by a specific employee and you want to search on the full name or part of the name, for example "Anne-lise Nielsen".	authors:Anne-Lise Nielsen Note: The search term is case sensitive. To search on part of a name, add an * before and after the search term, for example, authors:*Anne-Lise*.
title:	Cases or documents with specific words in the case or document title, for example "research".	title:research Note: To search for an exact phrase in a title, enclose your search terms in quotes or brackets, for example title:"research center" or title:(research center). The search result includes cases or documents with the same words in the same order as inside the quotes or brackets.
name:	Same as above	name:research
filename:	Cases or documents that contains a specific text in the file name, for example "hearing".	filename:hearing
person:	Cases with a specific party assigned, for example "Anne-lise Nielsen".	person:nielsen person:anne-lise Note: This is a combined search on first and last name.
to:	Cases or documents with a specific party with the role Recipient .	to:Marcus Note: This is a free text search on either Name 1 or Name 2.

Search tag	You want to view	Enter in Search field
from:	Cases or documents with a specific party with the role Sender .	from:filippa Note: This is a free text search on either Name 1 or Name 2.
cc:	Cases or documents with a specific party with the role Copy recipient .	cc:marie Note: This is a free text search on either Name 1 or Name 2.
size:	Large documents.	size:large
extension:	Documents of a specific file extension, for example Microsoft Excel sheets.	extension:xlsx

See [Supported search tags](#) for a list of search tags that includes the name of the fields that are searched in WorkZone Content Server.

7.1 Supported search tags

The table below lists the search tags that you can use to filter the search results of the **WorkZone Cases in [database]** and **WorkZone Documents in [database]** search connectors. The tables lists the search tags and the case and document fields in WorkZone Content Server that the search applies to.

Search tag	Case fields	Document fields	Accepts	Notes
created:	created	created	Date Date range Time expressions	
datecreated:	created	created	Date Date range Time expressions	
date:	created	created	Date Date range Time expressions	
modified:	updated	doc_time	Date Date range Time expressions	
datemodified:	updated	doc_time	Date	

Search tag	Case fields	Document fields	Accepts	Notes
			Date range	
			Time expressions	
due:	current_ reminder:reminder_ date	current_ reminder:reminder_ date	Date Date range Time expressions	
completed:	closed	record_closed	Date Date range Time expressions	
folder:	file_class or file_ class/path	file_elab	string	For case search: If string starts with = file_class is used otherwise file_class/path is used.
folderpath:	file_class or file_ class/path	file_elab	string	For case search: If string starts with = file_class is used otherwise file_class/path is used.
open:	closed	locked (meaning UL, ARK or AFS)	Bool (true / false)	
end:	plan_completed	reply_time_limit_ date	Date Date range Time frames	
owner:	officer	officer	string	
author:	create_user	create_user	string	
authors:	create_user/note	create_user/note	string	
title:	title	title	string	
name:	elab	title	string	
filename:	title	title	string	

Search tag	Case fields	Document fields	Accepts	Notes
person:	party/name/register_text:register_txt	party/name/register_text:register_txt	string	Free text.
to:	party/name/register_text:register_txt	party/name/register_text:register_txAt	string	Free text. Only parties with role/custom_label = Modtager is searched.
from:	party/name/register_text:register_txt	party/name/register_text:register_txt	string	Free text. Only parties with role/custom_label = Afsender is searched.
cc:	party/name/register_text:register_txt	party/name/register_text:register_txt	string	Free text. Only parties with role/custom_label = Kopimodt is searched.
size:	NA	doc_length	size filters	
extension:	NA	record_ext:extension	string	
[default]	register_text:register_txt	register_text:register_txt	string	Free text search

8. FAQs

This section contains a list of frequently asked questions on WorkZone Explorer functionality. Click any question below to see the answer.

WHY UNCLEAR ERROR MESSAGES?

Sometimes File Explorer does not show user friendly and descriptive error messages from the WebDAV server. When you perform an illegal operation, for example, try to move an archived document to another case, you only see a general error message such as: *Cannot read from source or disk*. Some of the Windows error messages that you might run into are explained in the FAQ items below.

WHY DO I GET AN ERROR MESSAGE WHEN I TRY TO ADD A DOCUMENT TO THE **DRAFTS** FOLDER?

You can only create new documents in specific case folders. You cannot, for example, create a new document directly in the **Drafts** folder, because the WorkZone requires a case for placing the document correctly in the system. If you try to add a document to the **Drafts** folder, you get the following Windows messages depending on where you try to add it from:

A device attached to the system is not functioning.

- or -

Can't read from the source file or disk.

WHY DO I GET AN ERROR MESSAGE WHEN I TRY TO CREATE A NEW CASE FOLDER?

By default WorkZone Explorer is not configured to allow creation of new cases. Case creation must be enabled on the SJ-TEMP class in the file class system. You apply this configuration using WorkZone Configuration Management. If you try to create a new case, you get the following Windows message:

Unable to create the folder 'New folder' - File system error

WHY DO I GET AN ERROR MESSAGE WHEN I TRY TO CREATE A NEW CASE FOLDER?

Some folders do not allow case creation. You can create new cases in the **Open cases**, **Unclassified cases** folders, and in specific case folders. If you try to create a new case folder in a folder, which does not allow case creation, you get the following Windows error message:

Unable to create the folder 'New folder' - File system error

See also [Create case](#).

WHY DO I GET AN ERROR MESSAGE WHEN I TRY TO MOVE A DOCUMENT FROM ONE FOLDER TO ANOTHER?

You are probably trying to:

- Move a document from one standard list to another.
- Move a document from a case folder to a standard list, for example to the **Open cases** folder.
- Move a document to a closed case.
- Move a document that is archived or closed.

This is not possible. In these cases, you get the following Windows error message:

Can't read from the source file or disc.

WHY ARE FOLDERS NOT DELETED WHEN THEY SEEM TO BE?

It is not possible to delete folders using WorkZone Explorer although it may look so in File Explorer. If you try to delete an empty folder, it looks as if the folder was successfully deleted but if you press F5 to refresh, the folder reappears. If you try to delete a folder with content, nothing happens after you have confirmed the deletion. File Explorer does not display any error message in this case.

WHY DO I GET A UNCLEAR ERROR MESSAGE WHEN I TRY TO RENAME A DOCUMENT?

There are several renaming scenarios where you might get this Windows error message:

Can't read from the source file or disk

For example, if you try to:

- Change the document ID (DXXX) in the document name. It is not possible to change the ID, only the document name can be changed.
- Rename a document, which is saved on a closed case. This is not possible.
- Rename a document in File Explorer but the document is opened in WorkZone Client or Captia Web Client.

WHY ARE DOCUMENTS NOT SHOWN IN FILE EXPLORER AFTER MOVING?

When you move documents between folders in File Explorer, File Explorer sometimes cannot handle the WorkZone mechanism that allows the same document to be exposed in multiple folders. When you move a document to the **Restore** folder, the document is actually moved somewhere else. It seems that File Explorer caches the information on the document location and refuses to open the document from somewhere else even if it is shown in the new location after refreshing. Try again a bit later and this issue is resolved.

9. Information for administrators

The topics below are targeted at administrators of WorkZone Explorer.

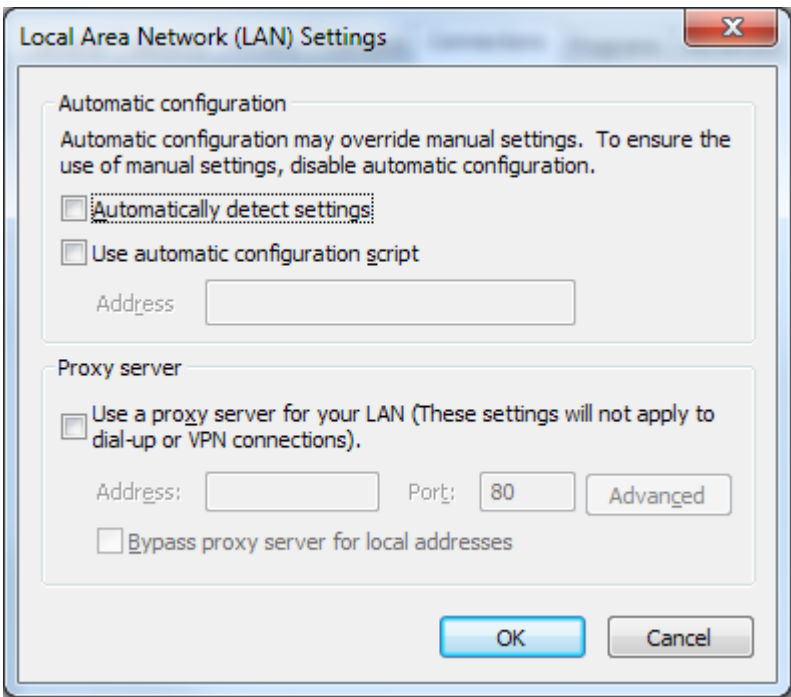
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9.1 Optimizing performance and user experience

To ensure optimal performance and user experience of WorkZone Explorer, you can apply specific configurations to clients and/or to the network/domain issued by group policies.

LAN AUTOMATICALLY DETECT SETTINGS

If browsing the WorkZone Explorer folders is slow, make sure that the **Automatically detect settings** check box in the **Local Area Network (LAN) Settings** dialog box is not selected on the client. To open this dialog box, in Internet Explorer click **Tools > Internet options > Connections tab > LAN Settings**.



INTERNET SECURITY ZONES

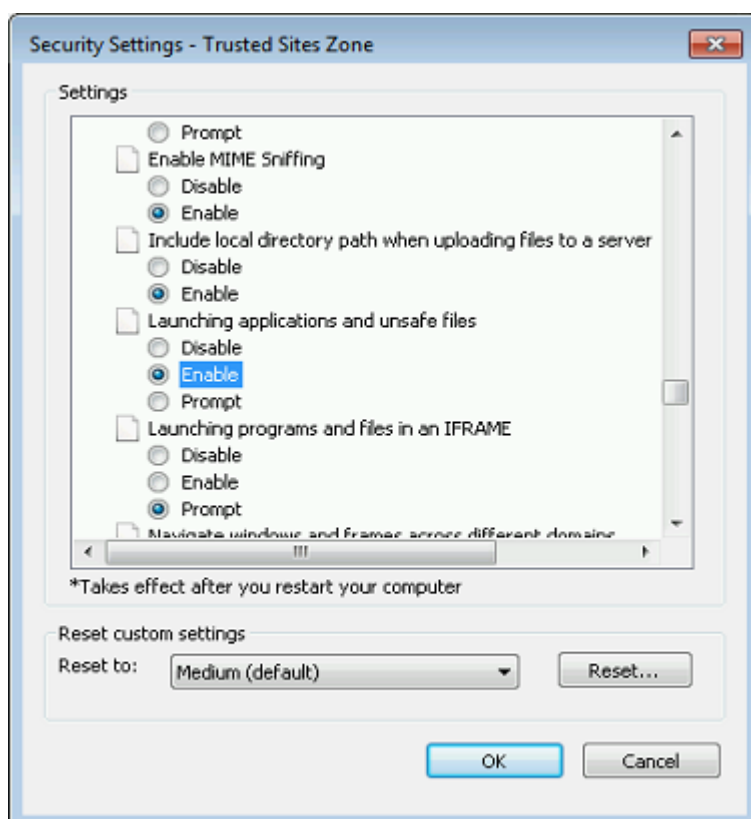
The WebDAV protocol is based on http and therefore the Internet Security zones applies to WorkZone Explorer. To ensure the best user experience and optimal performance, the WorkZone Explorer host name must be configured correctly in the Internet Security Zones.

1. In Internet Explorer, click **Tools > Internet options > Security** tab.
2. Add `http(s)://webdavhost` to either the **Trusted sites** zone or the **Local intranet** zone.

The **Local intranet** zone must be selected to have automatic integrated user authentication performed by Windows without **Log on** dialog boxes.

3. Add `file://webdavhost` to the **Trusted sites** zone.

If the file protocol is added to the **Local intranet** zone, searching using the search connectors perform slowly when showing the results. In some cases, you might receive a security warning when opening a document folder location from a search result or when moving documents from the **Recycle Bin** to the **Restore** folder. If you want to avoid these security prompts make sure that **Launching applications and unsafe files** is allowed for the **Trusted Sites** zone.



9.2 Advanced features

PERMANENT LINKS

It is possible to make permanent links to any document or case in the archive. This is available through a hidden folder called ".archive". All you need to know is the DNS, the ID, and the file extension, and then you can open any document using this http address:

```
http://[WebDAVHostHeader]/[DSN]/.archive/WhateverYouWant (D[RecordKey]).  
[Extension].
```

This mechanism can also be used to generate permanent links to documents.

You can also show cases through the .archive folder using:

```
http://[WebDAVHostHeader]/[DSN]/.archive/WhateverYouWant (C[FileKey])
```

VIEW ERROR MESSAGES

Sometimes File Explorer does not show user friendly and descriptive error messages from the WebDAV server in case of errors or illegal operations. See [FAQ](#).

If you want to see the real error from the system, you can use Fiddler on the client and this way see the actual response and error from the server.

RUN WORKZONE EXPLORER ON A WINDOWS SERVER

It is not possible to access clients or services directly from the web server. For information on how to enable access from the web server, see [Microsoft article 896861](#).

If you want to run WorkZone Explorer from File Explorer on a Windows Server operating system, you must also enable the Windows feature called **Desktop Experience**.

9.3 Troubleshooting

Click an issue below to see the solution or workaround.

AUTOMATIC AUTHENTICATION OF USERS FAILS WHEN ACCESSING WORKZONE EXPLORER THROUGH AN FQDN HOST

If you access WorkZone Explorer through an FQDN host name, automatic Windows authentication of users will not work. An error message is shown or the Windows **Logon** window displays repeatedly.

To make the logon happen automatically, add the http(s) address to the WorkZone Explorer host to the Windows registry named **AuthForwardServerList**. For example:

```
http://db01.lmdom.local.
```

You can find information on how to make this change in the registry in the [Microsoft article 943280](#). Follow the instructions listed under **Registry information** in the **Resolution** section.

Notes:

- You do not need to install the hotfix mentioned in the Microsoft article.
- The hotfix mentioned in the Microsoft article is included in Windows 8 although Windows 8 is not listed in the **Properties** section.

10. Terms and conditions

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